CStoreOffice®

Item Level Inventory Preparation Checklist

For Petrosoft Customers

PETROSOFT

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CStoreOffice®

ITEM LEVEL INVENTORY PREPARATION CHECKLIST

This section is designed as a preparation guide for item level inventory. It is broken down into the following sections:

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- During Inventory
- After Inventory
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Before Inventory Requirements for CStoreOffice®

CStoreOffice® Requirements	Yes	No
Are scannings occurring at a rate of > 99%? Are PLUs set up in CStoreOffice® to account for items without UPCs?		
Are all invoices accepted properly?		
Are managers trained to look for errors before accepting invoices, such as checking GPMs on the invoice?		
Are shippers dealt with properly on invoices (that is, shippers' UPCs deleted, and line items of products inside shipper added)?		
Are parent-child relationships set up in CStoreOffice®?		
Do all items have correct departments and categories set up in CStoreOffice®?		
Are Ingredient Method of Accounting Departments set up correctly in CStoreOffice®?		
Are all invoices entered by line item?		
Are all unit in case sizes correct in CStoreOffice®?		
Are merchandise transfers between stores added by individual UPC?		
Is spoilage entered daily into CStoreOffice®?		
Have all pending price change tickets been processed?		
Are all price changes recorded through price change tickets, then counted by the manager and updated in the system (this option is disabled in the system by default and needs to be enabled)?		
Are managers following up on outstanding credits from vendors?		
Has/Have youthe handheld(s) been synced your handheld to load the most current prices and Price Book before starting the count?		

Best Practices for Operational Set Up

CStoreOffice® Requirements	Yes	No
Has inventory been planned for the day of the week when inventory is the lowest? This is usually the day before main grocery suppliers deliver.		
Has an outside company been hired to do at least an initial item inventory (if not, for all inventories)? The first item level inventory count is to get a "starting point."		
Has the inventory process been discussed in advance with the counters (ways to count, what to count first and last, etc.)?		
Have "count cards" been prepared to place in areas that are to be counted? Index cards work great.		
Is there a diagram of the store layout so that areas are counted the same way each time?		
Are displays built keeping like products together (such as 12 packs of Coca-Cola, 12 packs of Diet Coke, and so on, in separate rows and not mixed throughout)?		
Is the backroom, cooler, backstock, and other areas of the store organized and cleaned with UPCs facing toward the counter?		
Are dump bins separated using cardboard inserts to keep like products in one area of the bin for easier counting?		
Are cashiers trained to ring items by individual UPC (that is, three Gatorade flavors need to be rung up as three separate UPCs, not scanned as one for all three)?		
Are returns on the register done correctly, by refunding the item, then ringing in the new item (if a Marlboro pack is scanned, but the customer wants Marlboro Lights, a refund should be done and re-rung correctly)?		

During Inventory

CStoreOffice® Requirements	Yes	No
Close shift right before the count is started.		
Count sections at a time, then place a count card in that area to remind employees that area was counted.		
Sync handheld after each section is counted (in case the battery dies or another problem arises during count).		
Don't move inventory around or stock shelves during the count.		
Close the shift when the inventory count is complete.		

After Inventory

CStoreOffice® Requirements	Yes	No

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Print out the Items Missed Report.	
The supervisor, manager and counters should all review inventory discrepancies together and sign off before inventory is processed.	
Process the count as Full Inventory in CStoreOffice®.	

Researching Inventory

CStoreOffice® Requirements	Yes	No
Find errors.		
Research errors.		
Identify cause of error.		
Eliminate cause of error.		
Retrain staff to avoid future errors.		
Correct Parent-Child Relationship Errors.		
Correct pack size errors.		
Correct department and category errors (if items are moved from one department to another, make sure the category is also moved or it will create non-itemized adjustments).		